

Dear Friends:

I am delighted to have the honor of serving as the official host for Maryland tourism’s marketing efforts. I have even starred in a series of television ads encouraging citizens to “Seize the Day Off!” and visit Maryland. While the ads are lighthearted and funny, tourism is serious business in this state.

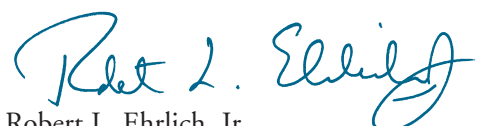
Tourism has an enormous impact on Maryland’s state and local economy. In this report you will see that tourism employment grew nearly 3 percent in 2004. In addition, tourism expenditures in Maryland grew to \$9.3 billion, up from \$8.8 billion. In nearly half of Maryland’s counties, the unemployment rate would double were it not for revenue generated from the tourism industry.

Our marketing is working. Visitors to the state grew by 5 percent – or more than a million people – in 2004, outpacing the national average by 100%. This demonstrates our tremendous success in marketing Maryland’s unique sites, whether they are in Western Maryland, Central Maryland, the Capital Region, the Eastern Shore, or Southern Maryland.

I am proud of our many successes today and even more excited about our achievements to come. We are expecting \$10 billion in economic impact from Maryland tourism this year; if that’s not exciting, I don’t know what is. I invite each of you to “Seize the Day Off” in Maryland.

Our diverse geography, outstanding natural resources, unique history and world-class attractions make our state a popular choice for visitors because we offer something for everyone. Whether you are a native looking for new destinations to daytrip, or have never visited this historically rich mid-Atlantic state, we are confident you will find the perfect outing for you and your family in Maryland.

Sincerely,


Robert L. Ehrlich, Jr.
Governor

MISSION STATEMENT

The Maryland Office of Tourism’s mission is to develop, package and market the resources of Maryland to a buying tourist audience for specific revenue benefits to be derived by the state.

The Maryland
Office of Tourism Development’s
Annual Report is published by the Maryland
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Robert L. Ehrlich, Jr., Governor
Michael S. Steele, Lt. Governor

Department of Business and
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2003 ECONOMIC IMPACT OF TRAVEL IN MARYLAND

Definitions: **Travel.** The act of taking a “trip”. **Trip.** A trip occurs, for the purpose of the model, every time one or more persons goes to a place 50 miles or more, each way, from home in one day, or is out-of-town one or more nights in paid accommodations, and returns to his/her origin. Specifically excluded from this definition are:

- (1) travel as a part of an operating crew on a train, plane, bus, truck or ship;
- (2) commuting to a place of work;
- (3) student trips to school or those taken while in school.

Direct Employment

Category	Domestic		International		Total
	2002	2003	2002	2003	2003
Public Transportation	19,700	18,700	500	400	19,100
Auto Transportation	4,000	4,200	0	0	4,200
Lodging	18,700	18,800	1,400	1,300	20,100
Food Service	42,900	45,600	1,400	1,300	46,900
Entertainment & Recreation	12,300	13,700	700	700	14,300
General Retail Trade	5,000	5,100	700	700	5,800
Travel Planning	2,300	2,200	N/A	N/A	2,200
Totals	104,900	108,200	4,700	4,400	112,600

Expenditures (\$millions)

Category	Domestic		International		Total
	2002	2003	2002	2003	2003
Public Transportation	\$2,139.4	\$2,221.2	\$48.7	\$45.2	\$2,266.4
Auto Transportation	1,288.5	1,456.1	4.2	4.1	1,460.2
Lodging	1,585.2	1,617.2	104.3	97.6	1,714.7
Food Service	2,171.8	2,309.7	60.1	57.6	2,367.3
Entertainment & Recreation	616.7	685.4	31.0	30.0	715.4
General Retail Trade	674.8	722.7	88.9	84.5	807.3
Travel Planning	NA	NA	NA	NA	NA
Totals	\$8,476.4	\$9,012.3	\$337.3	\$319.0	\$9,331.3

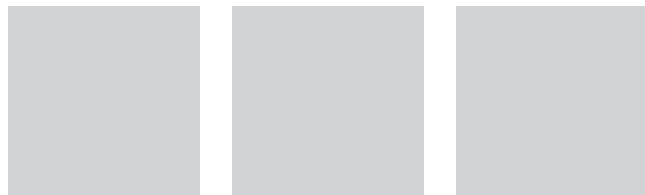
Note: Numbers are based on Calendar Year.
Source: Travel Industry Association of America, based on the most current data available.

TRAVEL IN MARYLAND: 2004 REVIEW

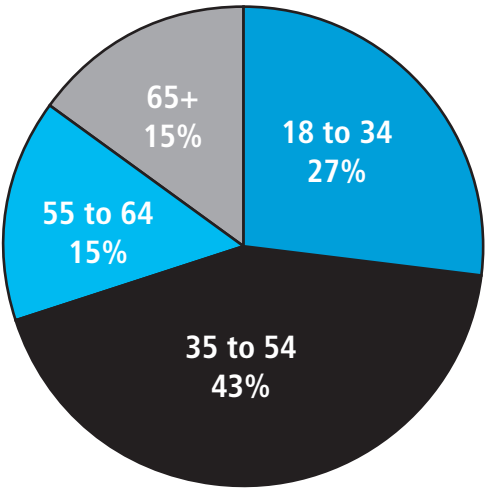
In 2004, 21 million person trips were taken to the state. Pleasure travel was up by 4.2 percent in 2004 and business travel increased by 9.7 percent compared to the previous year. Pleasure and business travel to Maryland outpaced national trends. Nationally, pleasure travel increased by 1.6 percent while business travel increased by 5.5 percent.

The average stay in Maryland remained approximately the same at 2.3 nights in 2004. Average per household spending in Maryland decreased from \$310 in 2003 to \$285 in 2004. Lower average spending in 2004 is in part attributable to modifications that were made to the survey in 2003. The increased capture of the volume of day trips, which spend less than overnight stays, contributed to lower average travel expenditures in 2004. Day trips in 2004 (28 percent) increased by 6.4 percent from 26.5 percent in 2003.

The top originating states for travelers to Maryland in 2004 were Maryland, Pennsylvania, Virginia, New York, New Jersey, Delaware, Florida, North Carolina, California, West Virginia, and Ohio. Travelers from these states made up approximately 82 percent of all travelers to the state.



Age of Head of Household



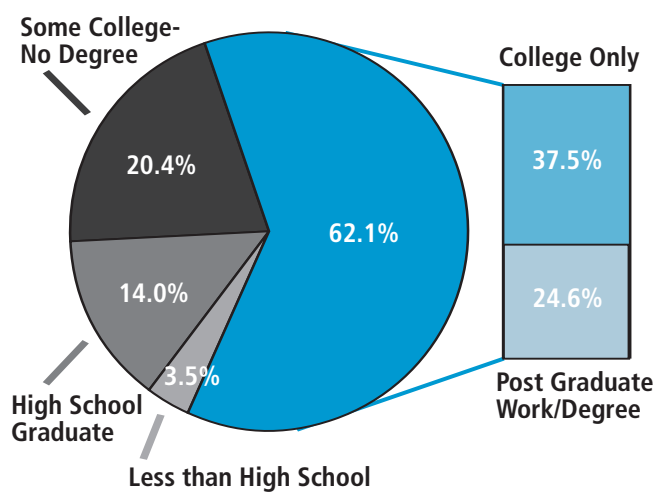
Some facts about Maryland visitors:

- ❑ The average traveler to Maryland is visiting with one other person from the household, stays 2.3 nights and spends \$285 in the state.
- ❑ Eighty-one (81%) percent of Maryland visitors traveled for pleasure; while, another 19 percent traveled for business.
- ❑ Car or truck is the primary transportation mode for 73 percent of travelers to Maryland; while, 17 percent travel by air.
- ❑ Seventy percent (70%) of Maryland visitors spent at least one night. Paid accommodations - hotels, motels, B&Bs, and condos/timeshares - are used by 36 percent of Maryland visitors and another 33 percent stayed in private homes.
- ❑ The number one activity for Maryland visitors was attending a social/family event, followed by shopping, historic/cultural activities, beach activities, and city/urban sightseeing.

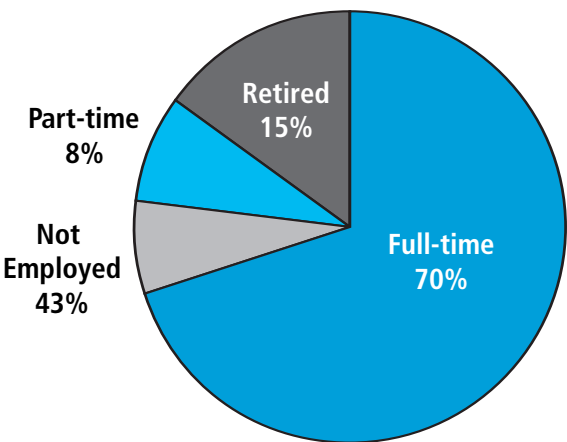
Some facts about Maryland visitors:

- ❑ The average age of travelers to Maryland in 2004 was 47 years old.
- ❑ Travelers to Maryland are well educated, with 62 percent having completed college. Of those travelers with a college degree, nearly 25 percent have done post-graduate work or have a post-graduate degree.
- ❑ Seventy percent (70%) are employed full-time and 15 percent are retired. The largest percent (30%) are employed in managerial and professional occupations.
- ❑ Forty-one percent (41%) have average annual household incomes of \$75,000 or more. The average annual household income is \$73,910.
- ❑ Sixty-two percent (62%) of travelers are married and 30 percent have children living in the household.

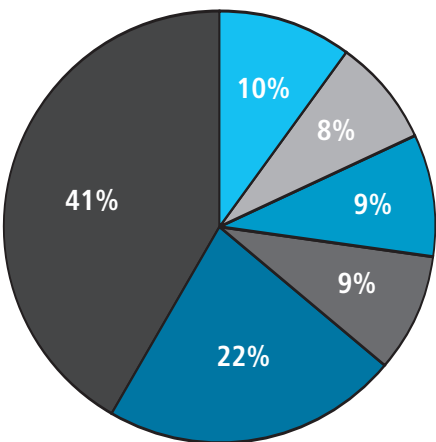
Education of Household



Employment Status of Head of Household



Annual Household Income



41%	\$75,000 and more
22%	\$50,000 to \$74,999
9%	\$40,000 to \$49,999
9%	\$30,000 to \$39,999
8%	\$20,000 to \$29,000
10%	Less than \$20,000

The source of information in this report is TravelScope. TravelScope is a national survey mailed to 300,000 households annually, asking them for detailed information about all travel 50 miles or more away from home and/or overnight stay by all members of the household. Households are asked to recall travel during the previous month. The purpose of the survey is to provide states with an accurate representation of the number and characteristics of tourists to their state. "Destination/Overnight Person-Trips" refers to all trips to Maryland except those persons who are just passing through. All data in this section is based on Destination/Overnight Person-Trips.

Office of Tourism Highlights

The Maryland Office of Tourism Development's promotional efforts and successes are truly collaborative in nature. In some years, there are events that require assistance and knowledge from not only the office, but from our partners throughout the state in the private and public sectors.

■ The state increased visitation by nearly 5% in 2004, which is double the national average.

■ OTD participated in two promotional opportunities that showcased Maryland to a national television audience:

- ◆ The Miss USA pageant, which broadcast live from Baltimore and showcased various regions of the state for 10 minutes, generated 8 million viewers, \$5.5 million in promotional exposure and \$1.5 million in direct expenditures.
- ◆ For the first time, the McDonald's LPGA Championship presented by Coca-Cola was played in Maryland after nearly 20 years in Delaware. There was a 30% increase in attendees at the "Superbowl of Women's Golf" and 1 million viewers turned into CBS to watch the action.



Secretary Melissaratos and Assistant Secretary Castleman met Shandi Finnessey, Miss USA® 2004 at the kick-off press conference



Lt. Governor Michael S. Steele announcing that the 54th Annual Miss USA® Competition will come to Maryland's historic, Hippodrome Theatre in Baltimore on NBC during April 2005.



Annika Sorenstam, LPGA Championship winner celebrates her victory with Governor Ehrlich and First Lady Kendel S. Ehrlich at one of the most prestigious and anticipated women's professional golf tournaments held at Bulle Rock in Havre de Grace, Maryland, June 5-11, 2005.

Resources Development and Visitor Services

The purpose of this unit is to continually research the impact of the tourism industry, engage in aggressive product development, administer the County Cooperative Marketing Grants Program, provide exceptional visitor services and train the tourism work force resulting in competitive advantage in the marketplace. The unit implements its program of work through the administration of the Attraction Signs Program, Research, Resources Development, Visitor Services, and Work Force Training.

■ OTD awarded \$1 million in grant funds through the County Cooperative Grants Program to the 25 Destination Marketing Organizations, that in turn spent \$4,230,221 of their own funds for a total impact of \$5,230,221.

■ The fourth of Maryland's four Civil War Trails opened on November 11, 2004 at the Maryland Historical Society. The Trail, entitled Baltimore: A House Divided, War on the Chesapeake Bay, showcases 54 new Civil War sites in eight counties and Baltimore City.

■ OTD also opened the Star-Spangled Banner Trail that is a 100-mile scenic and historic driving tour, which connects the events leading up to and including the writing of our National Anthem. The Trail connects 30 sites in 12 counties and Baltimore City.

■ Through participation on the Working Group of the Chesapeake Bay Gateways Network (CBGN), the Resources Development Team helped to secure \$994,763 in National Park Service funds for new products and bay restoration at 17 Maryland Gateways.



The Star-Spangled Banner Trail Map and Guide was produced to support the opening of the trail.

■ Through partnership with the National Park Service's Network to Freedom Program, OTD helped to increase the number of authenticated Underground Railroad sites, programs and facilities from 3 to 23 enabling OTD to begin the process to develop a statewide map-guide for release in early 2006.

■ OTD worked with the Maryland Dept. of Planning, the Appalachian Regional Commission, National Geographic and the states of NY, PA, OH, VA, WV, NC, KY, TN, SC, GA, AL and MS to promote heritage in the Appalachian Region through the production and distribution of a map-guide and the development of region-wide website.

■ The Resources Development Team received the three awards which include the National Park Service's Golden Arrowhead Award for Excellence in Interpretation, a MarCom Creative Award for Excellence in Marketing and Communications for the CBGN Communications & Marketing Plan and a Peerless Rockville Preservation Award for Maryland Civil War Trails.

■ There has been a 25 percent increase in volunteers at the Maryland Welcome Centers.

■ Worked cooperatively with the community-based organizations to prepare for the grand opening of the US 15 Welcome Center in Emmitsburg.



The Baltimore, A House Divided Trail Map and Guide was produced to support the opening of the trail.

Advertising and Communications

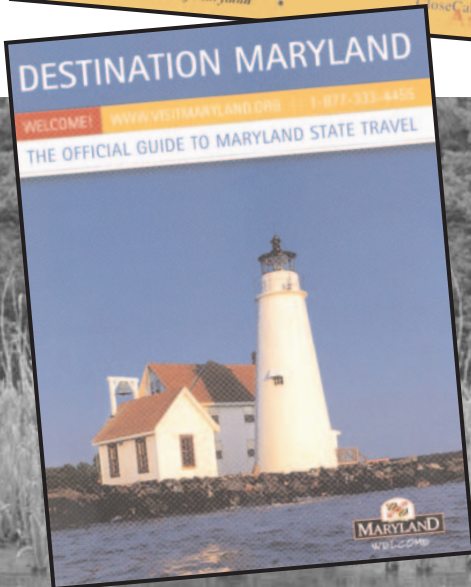
The purpose of this unit is to develop a communications program, which consists of advertising, public relations, publications, and special promotions. This unit is designed to encourage consumers and the trade target markets to respond to Maryland's marketing message to select the State as a leisure and business travel destination.

- The public relations team generated more than \$19 million in travel-related media coverage and had direct contact with nearly 800 media outlets and journalists.
- The private sector support OTD's public relations efforts with nearly \$50,000 worth of accommodations, admissions, and other travel-related services.
- Supported OTD's international efforts by conducting press tours for journalists from the United Kingdom, and Germany.
- The OTD web site was completely redesigned with a new look and feel. The new design was instituted to better reflect the needs of our customers.

- The advertising conversion rate has increased 2% to 64% from 62%. This validates that OTD is properly placing its media to reach its desired consumer base. This conversion rate is one of the highest in the region.

- Two publications received Best in Category Award from the Northeast Economic Development Association. The two publications were *Destination Maryland* and *The Civil War Trail Map and Guide* series.

- At ESTO 2005, OTD received the "Best Damn Advertising in the United States" award from one of its competitors, Virginia.



MARYLAND
WELCOME

1-800-543-9319
www.VisitMaryland.org

Seize the day off

Sales and Marketing

The Sales and Marketing Unit promotes the state's diverse tourism products to a variety of buyers. Products include Meetings & Conventions, Sports, Package Tours and Sales to Consumers in both the domestic and selected international markets. The unit also works with the clients, develops leads and distributes them to Maryland suppliers, and creates additional sales opportunities.

Consumer

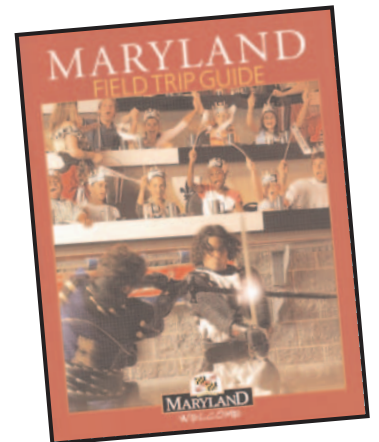
■ Participated in 13 consumer travel shows in Baltimore, MD; Richmond, VA; Cincinnati, Cleveland, and Columbus OH; and Harrisburg, Philadelphia, and Pittsburgh, PA. Thirty-two private sector partners participated in the brochure distribution program, and \$12,000 plus in-kind contributions.

Leisure Package Sales

■ Led Maryland partners on the Maryland on the Road (MORE) Sales Blitz and the Mini-Maryland on the Road (Mini-MORE) Sales Blitz. A total of 36 partners met with 76 representatives from 36 tour companies in Michigan, Northwest Ohio and Western Pennsylvania. Private sector investment in this blitz was more than \$25,000.

■ Created a "Maryland Team" to promote at 14 Group Leaders of America (GLAMER) marketplaces. The Team participants each sponsored and staffed one show allowing Maryland to be promoted to more than 1,500 potential buyers of group tour products. Total private sector booth sponsorship contribution exceeded \$6,000.

■ Highlighted Maryland's many student tour options to teachers and educators at the Maryland State Teachers Association convention, through direct mail and direct sales cooperative promotions and through Student Youth Tour Association marketplace. Twenty-four thousand potential planners of field trips were contacted through these various promotions



■ Coordinated the Maryland marketing team (including private sector and DMOs) at the National Tour Association, American Bus Association and the Pennsylvania Bus Association Marketplace. Supported these marketplaces through sponsorships, dine-around ancillary functions and thematic coordination (at PA Bus). These initiatives have included more than 90 Maryland marketing partners.

International

■ The Capital Region USA hosted a mega-fam tour for international press and operators prior to the TIA International Pow Wow held in New York. Clients went to Annapolis and Baltimore as well as golf at Renditions near Annapolis. The total cost of the project was \$223,000 in total expenses, of which \$198,000 was donated by the industry, and \$12,000 was raised to help offset expenses. More than 30 private and public sector partners worked together to make this possible, which generated three new tour programs and several articles, along with strong client education and retention for our existing clients.

■ On the state level, OTD hosted six tour operator fam tours with the generous help of the private sector that contributed \$52,300 in airline, attraction and accommodation donations.

■ The Capital Region USA Holiday Guide printed in both English and German became fully self supported with the growing support of advertisers who are seeing the growing influx of international visitors.

Return on Investment of OTD’s Advertising and Fulfillment

	FY 02 Advertising & Inquiry Fulfillment	FY 03 Advertising & Inquiry Fulfillment	FY 04 Advertising & Inquiry Fulfillment	FY 05 Advertising & Inquiry Fulfillment
Total Number of Inquiries/ Visitors	258,820	224,369	275,966	329,092
Percentage of Inquiries to Visit Maryland (within 4 months of advertisement and inquiry fulfillment)	62% 160,468	62% 139,109	62% 171,099	64% 210,619
Average Household Daily Trip Expenditure	\$140 \$22,465,576	\$119 \$16,553,945	\$129 \$22,071,761	\$124 \$26,116,741
Average Length of Stay (nights)	2.4	2.8	2.4	2.3
Total Dollars Spent in Maryland	\$53,917,382	\$46,351,045	\$52,972,226	\$60,068,505
Average Tourism Taxes Paid in Maryland	12.5%	12.5%	12.5%	12.5%
Taxes Paid in Maryland by Tourists Receiving Travel Information	\$6,739,673	\$5,793,881	\$6,621,528	\$7,508,563
Advertising Purchases and Fulfillment Expenditures	\$3,295,329	\$2,622,124	\$2,722,550	\$2,820,642
Return on Investment of State Taxes (to \$1.00)	\$2.05	\$2.21	\$2.43	\$2.66
Return on Investment of Tourism Economy (to \$1.00)	\$16.36	\$17.68	\$19.46	\$21.30

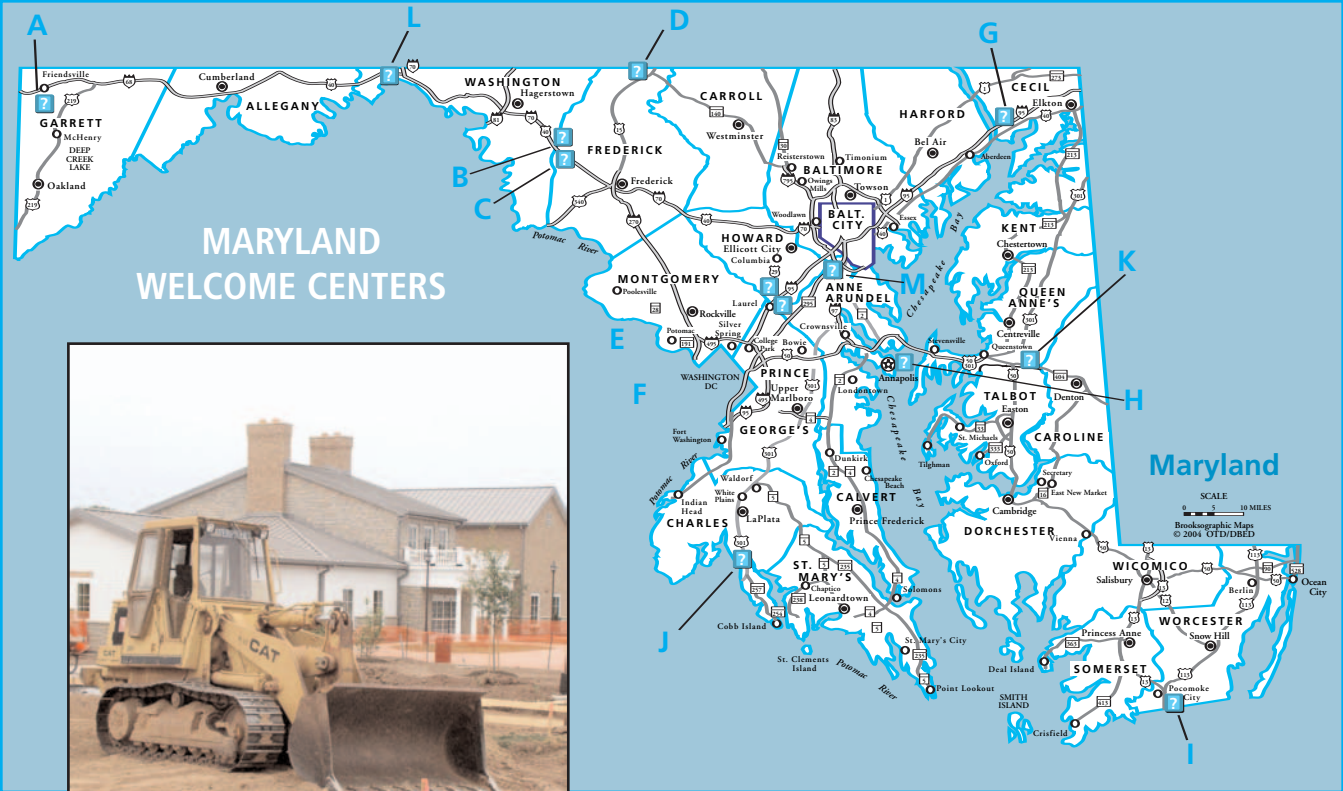
Note: Household expenditures and length of trip are based on Statewide averages derived from TravelScope survey.
Sources: TravelScope 2004 and OTD

COUNTY GRANT AND TAX FACT SHEET FY 05

COUNTY	Hotel/ Motel Tax Revenue ¹			Amusement & Admission Tax			Total Hotel/Motel & AA Tax Revenue	Total ² Tourism Tax Revenue	County Budget FY 05	County Grant Awarded FY 05
	FY 05 Rate	FY 05 Tax	Percent Change FY 04-05	FY 05 Rate	FY 05 Tax	Percent Change FY 04-05				
Allegany	8.0%	\$527,595	31.4%	7.5%	\$208,299	-27.6%	\$735,894	\$2,640,000	\$413,909	\$43,384
Anne Arundel	7.0%	13,236,560	4.0%	10.0%	7,676,215	0.6%	20,912,775	65,920,000	1,102,593	38,462
Baltimore City	7.5%	\$18,911,000	10.6%	10.0%	8,686,830	8.1%	27,597,830	45,810,000	8,620,774	112,297
Baltimore County	8.0%	\$7,863,234	10.3%	10.0%	7,124,415	1.9%	16,550,064	26,550,000	199,000	20,664
Calvert	0.0%	N.A.	N.A.	1.0%	447,912	71.3%	447,912	4,020,000	572,045	48,130
Caroline	0.0%	N.A.	N.A.	0.0%	3,853	48.4%	3,853	210,000	46,000	9,085
Carroll	0.0%	N.A.	N.A.	10.0%	775,598	-5.8%	775,598	2,090,000	205,429	17,666
Cecil	8.0%	\$231,699	48.3%	6.0%	353,067	-17.1%	584,766	6,830,000	125,000	24,555
Charles	5.0%	\$779,171	7.5%	10.0%	792,688	10.2%	1,571,859	3,550,000	304,000	40,906
Dorchester	5.0%	\$956,088	14.3%	0.5%	120,034	4.9%	1,076,122	1,810,000	360,287	31,764
Frederick	0.0%	N.A.	N.A.	0.5%	1,316,385	-6.6%	1,316,385	4,470,000	846,867	57,862
Garrett	5.0%	\$862,000	-6.4%	4.5%	520,749	12.4%	1,382,749	7,850,000	1,256,789	52,482
Harford	0.0%	N.A.	N.A.	5.0%	792,761	15.1%	792,761	4,660,000	103,791	16,224
Howard	5.0%	\$3,076,404	9.8%	7.5%	1,912,883	18.5%	4,989,287	13,760,000	513,019	41,486
Kent	3.0%	\$142,379	33.8%	4.5%	63,573	23.7%	205,952	1,970,000	211,862	18,530
Montgomery	7.0%	\$13,987,000	8.4%	7.0%	4,497,037	-4.2%	18,484,037	45,220,000	805,950	49,776
Prince George's	5.0%	\$6,183,600	8.8%	10.0%	12,655,831	-2.0%	18,839,431	27,500,000	736,143	37,638
Queen Anne's	3.0%	\$201,858	2.9%	5.0%	223,501	28.2%	425,359	2,590,000	312,808	35,798
St Mary's	5.0%	\$429,636	-1.8%	2.0%	121,648	5.8%	551,284	3,330,000	274,236	39,430
Somerset	5.0%	\$62,081	34.5%	4.0%	35,949	67.8%	98,030	920,000	264,199	13,292
Talbot	4.0%	\$744,000	31.0%	5.0%	103,788	9.5%	847,788	4,870,000	367,625	47,113
Washington	6.0%	\$1,347,333	18.6%	5.0%	562,183	8.3%	1,909,516	4,710,000	745,000	27,986
Wicomico	5.0%	\$773,431	9.6%	4.5%	472,554	-10.0%	1,245,985	5,010,000	637,618	25,950
Worcester*	4.0%	\$9,911,548	1.7%	3.0%	1,748,541	20.1%	11,660,089	68,030,000	2,255,029	149,524
TOTAL		\$80,226,617	7.9%		\$51,216,294	1.6%	\$133,005,326	\$354,320,000	\$21,279,973	\$1,000,004

Notes: *Worcester County includes Ocean City.
1. Some figures for hotel/motel tax revenue are unaudited/preliminary.
2. Total Tourism Tax Revenue includes a portion of local taxes such as property tax, income tax, sales tax generated by local tourism businesses in addition to Hotel/Motel and AA taxes.
Sources: Amusement Admission-Comptroller of the Treasury,
Hotel/Motel Tax Rate-Dept of Legislative Services, Uniform Financial Report,
Total Tourism Tax Revenue-Economic Impact of Travel on Maryland Counties 2003, TIA
County Budgets-OTD County Grant Application Forms.

WELCOME CENTER VISITORS



U.S. 15 Emmitsburg, our newest Welcome Center opened in August 2005. Landscaping and work on the new exhibit hall is still in progress.

Welcome Center	Visitors		Percent Change FY04-05
	FY04	FY05	
A. Youghiogheny	80,095	89,595	11.9%
B. I-70 West	73,362	77,902	6.2%
C. I-70 East	112,985	113,497	0.5%
D. U.S. 15 *	100,446	73,276	-27.0%
E. I-95 South	174,424	178,252	2.2%
F. I-95 North	205,789	181,016	-12.0%
G. Chesapeake House	249,595	266,971	7.0%
H. State House	167,882	174,165	3.7%
I. U.S. 13	220,090	217,206	-1.3%
J. Crain Memorial	135,947	130,424	-4.1%
K. Bay Country	91,761	86,948	-5.2%
L. Sideling Hill	124,044	124,122	0.1%
M. BWI Welcome Center	390,260	363,989	-6.7%
Total	2,126,680	2,077,363	-2.3%

Note: Welcome Center statistics are obtained by door counters and staff tallies.
* U.S. 15 and BWI were under renovation and new construction throughout Fiscal Year 05.

TOP 10 STATES OF ORIGIN FOR VISITORS TO MARYLAND

ADVERTISING INQUIRIES					
FY 03	Percent	FY 04	Percent	FY 05	Percent
Pennsylvania	11.4	Pennsylvania	11.7	Pennsylvania	10.7
New York	10.5	New York	9.4	New York	10.4
New Jersey	6.8	New Jersey	7.0	New Jersey	7.3
Virginia	4.9	Virginia	4.9	Virginia	5.1
California	3.9	California	4.2	Ohio	4.1
Ohio	3.8	Ohio	4.0	California	3.8
Texas	3.6	Texas	3.7	Texas	3.4
Florida	3.3	Florida	3.6	North Carolina	3.2
Illinois	2.5	Illinois	3.2	Florida	3.0
North Carolina	2.2	North Carolina	2.4	Illinois	2.7
Total	52.9	Total	54.1	Total	53.7
Maryland	16.1	Maryland	13.0	Maryland	14.8
TRAVELSCOPE					
CY 02		CY 03		CY 04	
Pennsylvania	17.6	Pennsylvania	17.7	Pennsylvania	13.7
Virginia	11.1	Virginia	10.3	Virginia	13.0
New York	7.7	New York	8.3	New York	6.7
New Jersey	7.7	New Jersey	7.8	New Jersey	4.4
Florida	3.6	North Carolina	3.7	Delaware	3.7
North Carolina	3.5	Florida	3.3	Florida	3.6
Delaware	3.1	Ohio	2.3	North Carolina	2.9
West Virginia	2.7	Delaware	2.2	California	2.9
California	2.4	Texas	2.2	West Virginia	2.4
Ohio	2.2	California	2.0	Ohio	2.3
Total	61.6	Total	59.8	Total	55.6
Maryland	19.7	Maryland	23.1	Maryland	26.0
WELCOME CENTERS					
FY 03		FY 04		FY 05	
Pennsylvania	14.5	Pennsylvania	14.3	Pennsylvania	14.9
Virginia	11.2	New York	13.5	New York	13.0
New York	11.2	Virginia	10.9	Virginia	10.4
New Jersey	8.5	New Jersey	9.1	New Jersey	8.9
Florida	4.3	D.C.	4.3	Ohio	4.2
North Carolina	3.9	Florida	3.9	DC	4.1
Ohio	3.6	North Carolina	3.6	Florida	3.6
West Virginia	3.0	Ohio	3.5	North Carolina	3.5
DC	2.9	West Virginia	2.4	West Virginia	2.5
Delaware	2.4	Michigan	1.7	Michigan	2.0
Total	65.5	Total	67.2	Total	67.1
Maryland	13.4	Maryland	12.6	Maryland	12.7

STATES THAT PLACED IN ALL THREE MEASUREMENTS:
FL, NC, NJ, NY, OH, MD, PA, VA

FY 05 DOMESTIC ADVERTISING: Activity and Response Volume

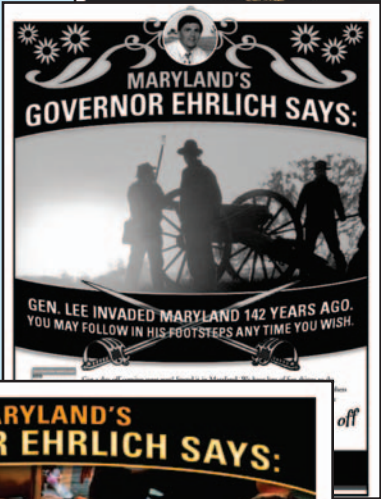
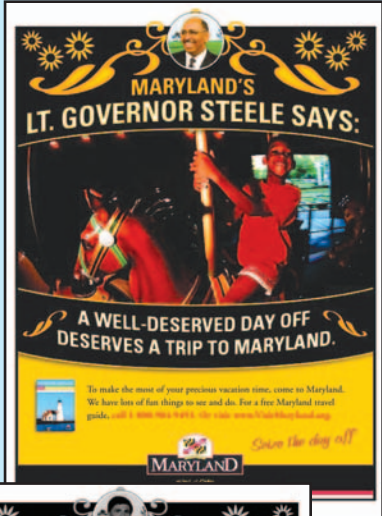
Consumer Print Advertising

Magazine	Total Leads	Total Ad Buy	Cost Per Lead	Magazine	Total Leads	Total Ad Buy	Cost Per Lead
AAA Going Places	2273	\$26,526	\$11.67	Macleans Magazine	36		
AAA Guide Book	968	\$22,398	\$23.14	Marine Trade Association	26		
AAA Touch	50	\$3,187.50	\$63.75	Maryland Business Review Magazine	11		
AAA Traveler	36	\$2,970.75	\$82.52	Maryland Golf Guide Brochure	103		
AAA World	2718	\$50,745	\$18.67	Maryland Million/Preakness Program Ad Book	57		
African-American Brochure	50			Meredith Publications	9890	\$223,521	\$22.60
AMC Outdoors	25			Motor Home	123		
American Heritage	77	\$17,850	\$231.82	National/Regional/ Campground/Directory	38		
American Legacy	25	\$14,450	\$578.00	Natural History	838	\$11,300	\$13.48
American Photography	182			North East Golf Market Magazine	34		
American Vision	33			NY Times Sophisticated Traveler	17		
Bed & Breakfast	17			Ottawa Citizen Newspaper	12		
Boating	15			Outdoor Explorer	11		
Budget Travel	691	\$30,371	\$43.95	Outside Magazine	86		
Car and Travel	663	\$22,197	\$33.48	Pathfinders	18	\$7,140	\$396.67
Civil War Traveler	6760	\$3,706	\$.55	PGA Tour State Farm Classic	16		
Coastal Living	1737	\$39,676.50	\$22.84	Popular Photography	600		
Cooking Light	262			Preservation	1388	\$51,899	\$37.39
Country Living	44			Primedia Magazines	102	\$9,010	\$88.33
Destination MD Guide Trip Planner	711			Research Maryland College Book	14		
Destination MD Outdoor Ad	32			Senior PGA Tour	11		
DNR	10			Smithsonian	70		
Ebony	80			Southern Living	10396	\$60,550	\$5.82
Endless Vacation	1903	\$15,317	\$8.05	Toronto Star Newspaper	62		
Essence	112	\$22,519	\$201.06	Toronto Sun Newspaper	23		
Field Trip Folder	10			Trailer Life	51		
Fisherman Magazine	30			Travel 50 & Beyond	2214	\$2,140	\$0.97
Globe and Mail	87			Travel Information (AAA/Rand Combined)	12400	\$12,200	\$0.98
Golf Digest	13			USA Weekend	5236	\$60,813	\$11.61
Golf Magazine	10			Vacation Values Newspaper	4904	\$28,500	\$5.81
Good Housekeeping	18			Washington County Travel Guide (free ad)	25		
Gourmet	49			Washington Golf Monthly	192		
Great Vacations Getaways	2759	\$6,764	\$2.45	Washington Post	21		
Heritage Area Map	13			Yankee	12		
Interstate Exit Authority	19			(Miscellaneous/Deactivated Lines)	654		
Journey/Leisureways	10						
L'Actualite	12						
Links	20			Monthly Total	72,215	\$745,750	10.33

FY 05 DOMESTIC ADVERTISING Activity and Response Volume

Electronic Media

	Total Cost	Total Leads	CPL
INTERNET			
<i>Fall</i>	\$57,400		
Philly.com			
Motley Fool.com			
History Channel.com			
Tribune.com			
NYT.com			
<i>Spring</i>	\$137,368		
NYT.com			
Tribune			
Weather.com			
Fool.com			
History Channel			
Soul of America			
Yahoo			
Real Cities Network			
Value Click			
Google			
Travelocity	\$50,000		
WashingtonPost.com	\$40,000		
Total Internet	\$284,768	120,348	\$2.37
BROADCAST			
Network Cable DRTV (fall)	\$327,000		
HGTV			
Travel Channel			
History Channel			
Network Cable DRTV (spring)	\$555,200		
A&E			
History			
Travel			
Spot TV (spring)	\$503,759		
Cleveland-Akron			
Hartford-New Haven			
Pittsburgh			
Richmond			
Comcast SportsNet (fall)	\$38,444.35		
Comcast SportsNet (spring)	\$36,125		
LPGA Sponsorship	\$40,550		
TV Total	\$1,501,078	16,181	\$92.77
<i>Radio</i>			
Orioles Radio Network WBAL (fall)	\$114,750		
African-American Radio Promotion (May-September)	\$240,000		
Radio Total	\$354,750		
Total Broadcast	\$1,855,828	136,529	\$13.59
TOTAL ELECTRONIC	\$2,140,596	256,877	\$8.33



Summary Table			
	Total Cost	Leads	CPL
Total Print	\$745,750	72,215	\$10.33
Total Electronic	\$2,140,596	256,877	\$8.33
FY'05 Total	\$2,886,347	329,092	\$8.77

MARYLAND'S 2004 TOP 3 DESTINATIONS FACT SHEET

	Baltimore City	Ocean City	Annapolis
Person Trips	5,967,806	3,750,652	1,106,550
Percent of Maryland	28.4%	17.8%	5.3%
Total Travel Party Size	1.7	2.6	2
Average Trip Length	3.3 nights	4 nights	3.1 nights
Average HH Trip Expenditure	\$360	\$414	\$357
Day Trip (% of total person trips)	1,414,370 (23.7%)	570,099 (15.2%)	295,449 (26.7%)
Top 3 DMAs of Origin	New York	Baltimore	Norfolk-Porstmouth-Newport News-Hampton
	Washington, D.C.	Washington, D.C.	Baltimore
	Philadelphia	Philadelphia	Philadelphia
Top 5 Activities	Attend a social/family event	Beach activities	Attend a social/family event
	Shopping	Shopping	Shopping
	City/Urban sightseeing	Theme/Amusement Park	City/Urban sightseeing
	Zoo/Aquarium/Science museum	Water sports/boating	Attend sports event
	Historical/Cultural activities	National/State Park	Historic/cultural activities

2003 Top Destinations	
1. Baltimore	6. Hagerstown
2. Ocean City	7. Bethesda
3. Annapolis	8. Cumberland
4. Frederick	9. Silver Spring
5. Salisbury	10. Rockville

2004 Top Destinations	
1. Baltimore	6. Silver Spring
2. Ocean City	7. Rockville
3. Annapolis	8. Cumberland
4. Frederick	9. Salisbury
5. Hagerstown	10. Bethesda

2004 TRAVEL BAROMETER

2003 \$2,069,170 \$3,541,468 \$4,399,380 \$2,749,083 \$12,759,101

2004 \$2,214,034 \$3,860,048 \$4,659,928 \$2,619,772 \$13,353,782

MD Selected Tourism Businesses Sales Tax Receipts

Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Total
2003	2,069,170	3,541,468	4,399,380	2,749,083	12,759,101
2004	2,214,034	3,860,048	4,659,928	2,619,772	13,353,782
% Change	7.0%	9.0%	5.9%	-4.7%	4.7%

The Travel Barometer is an indication of the health of the tourism industry in Maryland, which OTD created as a step in establishing a credible travel indicator. The Travel Barometer uses sales tax receipts from specific tourism businesses in Maryland. Sales tax data is compiled on a quarterly basis for the purpose of analysis.

In 2004, the Travel Barometer showed an increase of 4.7% over the previous year. The first three quarters increased over the previous year, only the fourth quarter declined from the previous year.

Source: Maryland Comptroller's Office

Travel Trends

Maryland-United States

Calendar Years: 2003-2004

The following information is based on TravelScope data, a national survey mailed to 300,000 households annually. The households are selected to be representative of the U.S. household population to determine specific details about U.S. travel behavior. The survey asks for detailed information about all travel 50 miles or more away from home and/or overnight stay by all members of the household. All numbers are percentages unless otherwise indicated.

Traveler Profile	Maryland			National		
	2003	2004	Percent Change	2003	2004	Percent Change
Person Trips	20,043,000	21,015,000	4.8%	1,140,000,000	1,163,947,000	2.1%
Percent of National Total	1.7%	1.8%	6.2%			
Average HH Travel Party Size	2.0	2.0	0.0%	2.1	2.1	0.0%
Average Duration	2.4	2.3	-4.2%	3.1	3.1	0.0%
Avg HH Trip Expenditures	\$310	\$285	-8.1%	\$420	\$433	3.1%
Avg HH Income	\$76,284	\$73,910	-3.1%	\$69,523	\$71,771	3.2%
Avg. Number of Children Under the Age 18 on Trip	1.8	1.8	0.0%	1.8	1.8	-100.0%
Percent of Trips with Children	22.6%	24.3%	7.5%	26.4%	25.9%	-1.9%
State of Origin	Percent of Total			Percent of Total		
Maryland	23.1	26.0	12.6%	1.9	2.0	5.3%
Pennsylvania	17.7	13.7	-22.6%	3.8	3.7	-2.6%
Virginia	10.3	13.0	26.2%	2.8	2.9	3.6%
New York	8.3	6.7	-19.3%	5.3	5.2	-1.9%
New Jersey	7.8	4.4	-43.6%	2.8	2.7	-3.6%
Delaware	2.2	3.7	68.2%	0.3	0.3	0.0%
Florida	3.3	3.6	9.1%	5.4	5.0	-7.4%
North Carolina	3.7	2.9	-21.6%	3.1	3.1	0.0%
California	2.0	2.9	45.0%	11.9	11.8	-0.8%
West Virginia	1.7	2.4	41.2%	0.5	0.5	0.0%
Ohio	2.3	2.3	0.0%	3.5	3.6	2.9%
Top 3 Designated Market Areas (DMA) of Origin	2003			2004		
	Washington, D.C.	15.4		Washington, D.C.	17.1	
	Baltimore	13.8		Baltimore	15.2	
	New York	12.4		New York	8.6	

Trip Profile	Maryland			National		
	2003	2004	Percent Change	2003	2004	Percent Change
Purpose of Trip (Primary)						
Pleasure	83.1	80.8	-2.8%	82.6	82.1	-0.6%
Business	16.9	19.2	13.6%	17.4	17.9	2.9%
Method of Travel						
Auto/ Truck	77.2	73.3	-5.1%	76.5	73.6	-3.8%
Rental Car	4.3	3.7	-14.0%	3.0	3.2	6.7%
Camper/ RV	1.6	0.5	-68.8%	1.8	1.7	-5.6%
Airplane	14.1	17.1	21.3%	15.5	16.2	4.5%
Bus	1.3	1.2	-7.7%	1.3	1.2	-7.7%
Train	1.6	1.6	0.0%	0.7	1.6	128.6%
Ship/ Boat	0.4	0.8	100.0%	0.7	0.7	0.0%
Motorcoach	0.7	0.7	0.0%	0.6	0.5	-16.7%
Overnight Lodging						
Paid Accommodations	38.4	36.1	-6.0%	43.7	43.6	-0.2%
Private Home	30.5	32.7	7.2%	30.6	31.2	2.0%
RV/ Tent	2.5	1.6	-36.0%	5.2	5.1	-1.9%
Day Trip	26.5	28.2	6.4%	23.5	23.2	-1.3%
Activities (mutple responses - sum will exceed 100)						
Attend a Social/ Family Event	25.4	26.2	3.1%	26.7	27.3	2.2%
Shopping	24.1	23.6	-2.1%	30.5	30.3	-0.7%
Historic/ Cultural	10.3	12.4	20.4%	16.9	17.4	3.0%
Historic Places/ Museums	7.1	5.8	-18.3%	8.4	8.5	1.2%
Cultural Events/ Festivals	2.2	3.0	36.4%	3.1	3.2	3.2%
Performing Arts	1.6	1.7	6.3%	3.6	3.8	5.6%
Art Museums/ Galleries	0.9	1.9	111.1%	1.8	1.9	5.6%
Beach Activities	12.4	11.2	-9.7%	9.6	9.1	-5.2%
City/ Urban Sightseeing	7.5	7.6	1.3%	10.0	10.3	3.0%
Seminar/ Courses	5.2	5.4	3.8%	6.3	6.4	1.6%
Attend Sports Events	4.6	5.4	17.4%	5.6	5.6	0.0%
Outdoor Activities	7.0	5.1	-27.1%	11.0	10.8	-1.8%
Zoo/ Aquarium/ Science Museum	5.8	4.9	-15.5%	5.3	5.4	1.9%
Nightlife/ Dancing	5.4	4.7	-13.0%	6.1	6.0	-1.6%
Rural Sightseeing	6.6	4.4	-33.3%	9.9	9.7	-2.0%
National/ State Parks	5.4	4.2	-22.2%	6.8	7.0	2.9%
Theme/ Amusement Parks	3.4	3.8	11.8%	6.9	6.8	-1.4%
Water Sports/ Boating	3.9	2.4	-38.5%	4.6	4.3	-6.5%
Golf	1.0	0.9	-10.0%	2.1	2.1	0.0%
Winter Sports	1.1	0.1	-90.9%	1.5	1.3	-13.3%
Maryland Regions Visited***	2003	2004	Percent Change	***About 21% of the travelers to Maryland did not indicate where specifically they traveled within Maryland. We have distributed these travelers into each region according to the percentage that each region had of a Maryland total trip.		
Central Region	8,752,127	9,037,504	3.3%			
Eastern Shore	5,272,476	5,412,504	2.7%			
Capital Region	3,715,205	4,378,913	17.9%			
Western Maryland	1,976,034	1,644,288	-16.8%			
Southern Maryland	327,158	541,791	65.6%			
Total	20,043,000	21,015,000	4.8%			

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I-95 North
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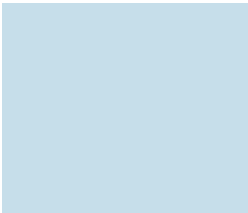
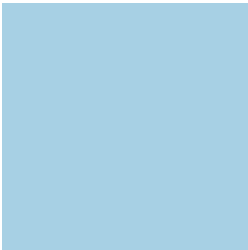
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